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|--|---|--|----------|--|-----------------------|----------------------------|-------------------|
| ERRS Task Order Surveillance Activity Checklist for: (Site Name) | | | | | | | |
| Prepared by (TO Monitor): | | Date: "ADD" | | TO Number: | | | |
| Reviewed by (Project Officer): | | Date: "ADD" | | Evaluation Period: / / to / / | | | |
| Contract: | | Performance Categories Ratings (Ratings for deliverables will be straight-line averaged to determine annual CPARS ratings and annual Contract Rating) | | | | Overall Deliverable Rating | |
| Title of Deliverable/ Outcome | Type of review I=Interim F=Final Product O=Ongoing | Quality | Schedule | Cost Control | Business Relations | Management | Average Rating |
| 1. Response | <i>"O or F"</i> | | | | | | |
| 2. Report (s) | <i>"I or F"</i> | | | | | | |
| Average monthly rating for each performance category (To be completed by Project Officer and shared with contractor during performance discussions) | | | | | | | |
| The TO Monitor <i>has / has not</i> provided verbal feedback to the contractor related to the above comments. <i>"Should provide immediate verbal feedback to the contractor...so performance is recognized."</i> | | | | | | | |

| Guidance on Performance Categories to be used in determining ratings | | | |
|--|---|--|---|
| <p><u>Quality of Product or Service</u></p> <ul style="list-style-type: none"> • Compliance with contract requirements • Accuracy of Reports • Effectiveness of Personnel • Technical Excellence <p>Ratings:</p> <p>0 - Contractor is not in compliance and is jeopardizing achievement of contract objectives</p> <p>1 - Major problems have been encountered</p> <p>2 - Some problems have been encountered</p> <p>3 - Minor inefficiencies/ errors have been identified</p> <p>4 - Contractor is in compliance with contract requirements and/or delivers quality products/services</p> <p>5 - The contractor has demonstrated an outstanding performance level that justifies adding a point to the score.</p> | <p><u>Cost Control</u></p> <ul style="list-style-type: none"> • Record of forecasting and controlling target cost • Current, accurate and complete billings • Comparison of negotiated costs to actual expenditures • Costs efficiencies or deficiencies <p>Ratings (based on contractor self-reporting):</p> <p>0 - less than 70% of deliverables on-budget</p> <p>1 - 70 - 79% of deliverables on - budget</p> <p>2 - 80 - 89% of deliverables on-budget</p> <p>3 - 90-93% of deliverables on-budget</p> <p>4 - 94 - 96% of deliverables are on-budget and no significant impact to projects due to budget overages</p> <p>5 -97% or more deliverables are on-budget and no significant impact to projects due to budget overages</p> | <p><u>Timeliness of Performance</u></p> <ul style="list-style-type: none"> • Met interim Milestones • Reliability • Completed on time, including wrap-up and contract administration • Met delivery schedules <p>Ratings (based on contractor self-reporting):</p> <p>0 - less than 64% of deliverables on-time</p> <p>1 - 65 - 74% of deliverables on -time</p> <p>2 -75 - 84% of deliverables on-time</p> <p>3 - 85-89% of deliverables on-time</p> <p>4 - 90 - 94% of deliverables are on-time and no significant impact to projects due to lateness</p> <p>5 -95% or more deliverables are on-time and no significant impact to projects due to lateness</p> | <p><u>Business Relations/Management</u></p> <ul style="list-style-type: none"> • Effective Management, including subcontracts • Reasonable/cooperative behavior w/external customers • Responsive to contract requirements • Notification of problems • Flexibility • Pro-active vs. reactive <p>Ratings:</p> <p>0 - Management of outcome and communications related to deliverable is not effective</p> <p>1 - Management of outcome and communications related to deliverable is marginally effective</p> <p>2 - Management of outcome and communications related to deliverable is somewhat effective</p> <p>3 - Management of outcome and communications related to deliverable is usually effective</p> <p>4 - Management of outcome and communications related to deliverable is effective</p> <p>5 - The contractor has demonstrated an outstanding performance level that justifies adding a point to the score.</p> |

Comments

Task Order Monitor

Date

